

# Welcome to Taxpayer Service Center 101





# AGENDA

- ❑ **We will cover TSC overview and features**
- ❑ **Go over functionality for (IND & BUS)**
- ❑ **Go over DRS Admin Side functionality**
- ❑ **Go over procedures and pin letters**
- ❑ **Go over troubleshooting and FAQ**
- ❑ **Please write down any questions you may have and we will discuss them at the end of the class.**



# **Overview of TSC**

**What is it?** – The *Taxpayer Service Center* (TSC) is an interactive electronic services platform that like - Fast-File –offers a fast, free, accurate, and secure way to conduct business with DRS. There will be three areas available within the TSC – Individual, Business, and Tax Preparer.

## **FEATURES**

- ☐ It is a Self Service platform
- ☐ Taxpayer Functionality / DRS employee Functionality
- ☐ View Returns
- ☐ View/Schedule/Cancel Payments
- ☐ View Account Details
- ☐ View Outstanding Bills
- ☐ View Refund Status
- ☐ Update Banking Information
- ☐ File Original Returns
- ☐ File Amended Returns
- ☐ Register for new taxes
- ☐ Browse FAQ'S
- ☐ Request a Penalty Waiver
- ☐ Send questions and receive answers through secure Email – (Not Yet available)

- ☐ **Authenticated vs. Un-Authenticated Taxpayers**
- ☐ **Role of the TSC Administrator / Sub Users**
- ☐ **Create TSC Administrator Profile**
- ☐ **Add Sub Users**
- ☐ **Assign Access Rights to Sub-Users**
- ☐ **Edit/Disable Users**
- ☐ **Unlock Users**
- ☐ **Assign TSC Administrator Rights**
- ☐ **Update Banking Information**
- ☐ **View Return History (even returns filed on paper)**
- ☐ **View Processed Payments**
- ☐ **View Scheduled Payments**
- ☐ **View Cancelled Payments**
- ☐ **View Account Period Details**
- ☐ **Penalty Waiver**
- ☐ **Close Tax Types**
- ☐ **Update Address Information**
- ☐ **Third Party Bulk Filing**
- ☐ **View Business Profile**
- ☐ **Update Password/Profile**
- ☐ **Send/Retrieve Secure Messages (Mailbox)**
- ☐ **Demo Mode**



## Income Tax (Taxpayer Functionality)

## INDIVIDUAL

- ☐ Unauthenticated Filers/Authenticated Filers
- ☐ DMV Access
- ☐ File CT-1040, CT-1040NR/PY (Amended feature no longer available)
- ☐ View returns filed in TSC only for now.
- ☐ View Processed and Cancelled Payments
- ☐ View Payments scheduled in TSC except when submitted to the bank
- ☐ View Account Details and Outstanding Bills
- ☐ View Refund Status
- ☐ Make Bill Payments (authenticated and unauthenticated)
- ☐ Make Estimated and Extension Payments (authenticated only)
- ☐ Cancel Payments
- ☐ Update Banking Information
- ☐ Update password and profile
- ☐ Trust and Estate Filing

- ☐ View Taxpayer Contact Information
- ☐ Reset Taxpayer Password
- ☐ View Bank Information
- ☐ View Returns
- ☐ View Processed Payments/Credits
- ☐ View Scheduled Payments
- ☐ View Cancelled Payments
- ☐ View Account Details
- ☐ View Outstanding Bills



## PIN LETTERS FOR INDIVIDUALS

- ❑ Individuals will get their PINs mailed to them early January 2008
- ❑ PIN letters will be mailed to anyone that WebFiled or TeleFiled last year and have not yet created a profile in the *TSC/IND*.
- ❑ Booklets with PINs printed on them will be mailed to taxpayers who did NOT WebFile, TeleFile, or E-File last year.
- ❑ E-filers (Fed/State) will not get a letter or a booklet (NO PIN)
- ❑ Individuals will access the *TSC/IND* for the first time by using a “Shared Secret” which is the PIN and/or the federal AGI from a previous year (this would be the only option for those that are not mailed a PIN).
- ❑ If the taxpayer cannot answer their “Shared Secret” then they will have to file by paper or use a third party e-file option. We CANNOT send out a new PIN to an Individual (we can only generate PIN letters in ITAS to a business account).
- ❑ Once a taxpayer has created a profile in the *TSC/IND*, they will never be issued a PIN again.



## LETTERS FOR -901 OR -902

# CONSOLIDATED BUSINESS ACCOUNTS

If a business is requesting a PIN for an account ending in -901 or -902, please forward the following information to Jessica Jones (or Noemi Perry if Jessica is out):

- ☐ Business name
- ☐ CT registration number
- ☐ Contact name
- ☐ Mailing address





## FAQ

### Payment Questions

**Q-1 - How far back can a taxpayer view payments?**

**Payments can be viewed going back 6 years**

**Q-2- I need to cancel a scheduled payment, but don't have my confirmation number.**

**For authenticated users – Go to View Scheduled Payments/Credits and on the verification screen you will see the confirmation number.**

**For unauthenticated users – Income Tax Only – Select the make a payment link on the left, choose the period end. If the payment has not been sent to the bank a prompt on the screen will ask if you want to view or cancel or make another payment.**

**Q-3 - I want to cancel a payment but I don't see it listed. How can I cancel?**

**If you cannot see the payment it is because it has already been sent to the bank and is no longer available for cancelling. General Rule - Payments must be cancelled before 4:30 p.m. on the day they are made or 2 business days before a scheduled payment by 4:30 on the scheduled day.**



#### Q-4 - Can I choose the date for my electronic payment?

For returns you may choose any date up to the due date of the return. Late filed returns require electronic payment the next business day. If making a bill payment you may schedule up to 12 payments. The 1st payment must be made within 30 days, all others up to 12 months in the future.

#### Q-5 - I am not able to access the TSC with my Social. Can I still make a payment?

Taxpayers can make bill payments as unauthenticated taxpayers using the left hand tool bar.

#### Q-6 - I filed in the TSC but sent in a paper payment but I cannot see it in the TSC.

Payments sent in check format take several weeks to process. As long as you have a copy of the cancelled check then you will be ok. In the event that you receive a bill you just send a copy of the cancelled check with the bill and the account will be adjusted accordingly.

#### Q-7 - Why can't I see a payment that I scheduled without login in?

If the payment was scheduled and made on the un-authenticated side, the scheduled un-authenticated payment cannot be viewed if taxpayer logs in as authenticated until the payment has been processed.



## Questions about IND (Income Tax Filing)

**Q-8 - Does the TSC allow me to change my filing status?**

Only if the status changing is in the same relation to the previous status. The drop down box will show any changes in filing status the taxpayer may select from. If the status does not show in the list then the taxpayer cannot use the TSC. (I.e. a single filer would not be able to change to MFJ)

**Q-9 - I just moved to Connecticut. Can I use the TSC to file my return?**

Taxpayers may be able to access the TSC using a valid CT Driver's License Number (DLN). If they have a valid CT license they may see the following message when they enter their SSN:

Your SSN was found in the DMV records. To ensure the confidentiality of your tax information we must validate your identity using your driver's license number or Connecticut non-driver ID and name. If you choose a joint filing status, you will be prompted to enter similar information for the secondary taxpayer.



## Questions about View and File Functions

**Q-10 - Can returns that were not filed in the TSC (such as fast-filed or paper filed) be viewed in the TSC?**

**Currently only returns filed in the TSC can be viewed in the TSC. Hopefully in the next phase this feature will be available.**

**Q-11 - How do I change my address?**

**On the Individual Side – select “Update my information”**

**On the Business Side – select “Update address information”**

## Questions about resetting accounts

**Q-12 - What if I the TPS Employee get locked out?**

**Contact Noemi Perry - 4844, Jessica Jones - 4815, Danielle Toce – 4997 and they can reset you. Elaine and Peter can also reset but use only as a last resort.**



## Q-13 - How do I unlock a TSC account?

**Individual – Verify whether you are in fact speaking to the correct taxpayer. From the Admin side**

- ☐ Choose SSN from ID type drop down box, enter the number and click search
- ☐ From the main menu click “Reset Taxpayer Password”
- ☐ If account is locked and they know their password, choose unlock taxpayer
- ☐ If they don’t know the password click on “Create a New Web Password” and click on Unlock web password then read the temporary password that shows up to the taxpayer. Be sure to tell them that this is only a temporary password and they will have to reset once they enter the site again.

**Business – You can only unlock the Administrator of the TID. So if you are speaking to a subuser they must contact the Administrator listed. To unlock the Administrator follow these steps:**

- ☐ Choose TID from ID type drop down box, enter the number and click search
- ☐ From the main menu click “Reset Taxpayer Password”
- ☐ If account is locked and they know their userid/password choose unlock taxpayer
- ☐ If they don’t know the password click on “Create a New Web Password” and click on Unlock web password then read the userid and temporary password that shows up to the taxpayer. Be sure to tell them that this is only a temporary password and they will have to reset and answer the security questions once they enter the site again.



**Q-14 - What If the TSC Administrator is not available (on vacation, walked off the job, etc?)**

**If someone other than the business Administrator calls and the subuser needs access to the TSC Administrator account, follow these procedures:**

**❑ A request must be sent in by fax ATTN: Jessica Jones on company's official letterhead with the following information:**

- An explanation of why administrator is not available.**
- Their CT-Registration number in its entirety**
- Their fax number and telephone number**
- Full name, title and signature of individual making request**

**Fax to 860-297-4929 or 860-297-5727**

**Once Jessica receives the above information she will then proceed to fax the contact person the information needed to access the site.**



## Helpful Hints

- ❑ TSC Confirmation numbers are 13 digits. The confirmation number is the ITAS DLN #.
- ❑ For timely returns the Taxpayer can schedule a payment in advance up to the due date.
- ❑ For late filed returns – Payment must be made the next day Payments cannot be warehoused. Late returns filed in the TSC must be paid electronically. No paper check option.
- ❑ When passwords are reset in the system previous passwords are now accepted. No need to keep using different ones.
- ❑ Save and Exit can be done at any return without filing. The return will be saved for 30 days.
- ❑ Do NOT use **BACK** and **FORWARD** browser buttons. This will only refresh the page but take you nowhere. Taxpayers have to navigate in the TSC using the back and forward buttons at the bottom of each screen.
- ❑ Email addresses are mandatory when first signing up. If the taxpayer does not have an email address advise them to use a dummy one like [testemail@user.com](mailto:testemail@user.com) – but they will need to put something on the email field.
- ❑ Screens Idle for 20 minutes will automatically log off.



# LINKS

## Live Site Links

- ❑ Admin Page - <https://drsindtax.ct.gov/Admin/adminLogin.aspx>
- ❑ TSC Business - <https://drsbustax.ct.gov/AUT/welcomebusiness.aspx>
- ❑ TSC Individual - <https://drsindtax.ct.gov/AUT/welcomeindividual.aspx>

## Test Site Links

- ❑ TSC Business - <https://drsbustaxtest.ct.gov/AUT/welcomebusiness.aspx>
- ❑ TSC Individual - <https://drsindtaxtest.ct.gov/AUT/welcomeindividual.aspx>